

# **STATE PERSONNEL BOARD CALENDAR**



**SEPTEMBER 24, 2007**

**SACRAMENTO**

**State of California**

**Memorandum**

**DATE:** September 13, 2007

**TO:** ALL INTERESTED PARTIES

**FROM:** STATE PERSONNEL BOARD – Executive Office

**SUBJECT:** Notice and Agenda for the **September 24, 2007**, meeting of the State Personnel Board.

PLEASE TAKE NOTICE that on September 24, 2007, at offices of the State Personnel Board, located at 801 Capitol Mall, Room 150, Sacramento, California 95814, the State Personnel Board will hold its regularly scheduled meeting. Pursuant to Government Code section 11123, a teleconference location may be conducted for this meeting at 320 W. 4<sup>th</sup> Street, Los Angeles, California.

The attached Agenda provides a brief description of each item to be considered and lists the date and approximate time for discussion of the item.

Also noted is whether the item will be considered in closed or public session. Closed sessions are closed to members of the public. All discussions held in public sessions are open to those interested in attending. Interested members of the public who wish to address the Board on a public session item may request the opportunity to do so.

Should you wish to obtain a copy of any of the items considered in the public sessions for the September 24, 2007, meeting, please contact staff in the Secretariat's Office, State Personnel Board, 801 Capitol Mall, MS 52, Sacramento, California 95814 or by calling (916) 653-0429 or TDD (916) 654-2360, or the Internet at:

**<http://www.spb.ca.gov/calendar.htm>**

Should you have any questions regarding this Notice and Agenda, please contact staff in the Secretariat's Office at the address or telephone numbers above.



Allison Sanjo  
Secretariat's Office

Attachment



## CALIFORNIA STATE PERSONNEL BOARD

801 Capitol Mall • Sacramento, California 95814 • [www.spb.ca.gov](http://www.spb.ca.gov)

ARNOLD SCHWARZENEGGER, Governor



### **CALIFORNIA STATE PERSONNEL BOARD MEETING<sup>1</sup>**

801 Capitol Mall  
Sacramento, California

Public Session Location – 801 Capitol Mall  
Sacramento, California, Room 150  
Teleconference – 320 West 4<sup>th</sup> Street<sup>2</sup>  
Los Angeles, California, Suite 620

Closed Session Location – 801 Capitol Mall  
Sacramento, California, Room 141  
Teleconference – 320 West 4<sup>th</sup> Street  
Los Angeles, California Suite 620

### **MID MONTH BOARD MEETING – SEPTEMBER 24, 2007**

<sup>1</sup> Sign Language Interpreter will be provided for Board Meeting upon request - contact Secretariat at (916) 653-0429, or CALNET 453-0429, TDD (916) 654-2360.

<sup>2</sup>Pursuant to Government Code section 11123, a teleconference location may be conducted for this meeting at 320 West 4<sup>th</sup> Street, Los Angeles, California.

**MID MONTH BOARD MEETING AGENDA<sup>3</sup>**

**September 24, 2007**  
9:00 a.m. – 10:30 a.m.  
(or upon completion of business)

PLEASE NOTE: ALL TIMES ARE APPROXIMATE AND ARE SUBJECT TO CHANGE

**PUBLIC SESSION OF THE STATE PERSONNEL BOARD**

**(9:00 a.m. – 9:30 a.m.)**

- 1. ROLL CALL**
- 2. REPORT OF THE EXECUTIVE OFFICER – Suzanne M. Ambrose**
- 3. REPORT OF THE CHIEF COUNSEL – Elise Rose**
- 4. NEW BUSINESS**

Items may be raised by Board Members for scheduling and discussion for future meetings.

- 5. REPORT ON LEGISLATION – Sherry Evans**

The Board may be asked to adopt a position with respect to the bills listed on the legislation memorandum attached hereto.

**CLOSED SESSION OF THE STATE PERSONNEL BOARD**

**(9:30 a.m. – 10:00 a.m.)**

- 6. EMPLOYEE APPOINTMENTS, DISCIPLINARY MATTERS, AND OTHER APPEALS**

Deliberations to consider matter submitted at prior hearing.  
[Government Code Sections 11126(d), 18653.]

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<sup>3</sup> The Agenda for the Board Meetings can be obtained at the following internet address:  
<http://www.spb.ca.gov/calendar.htm>

**7. DELIBERATION ON ADVERSE ACTIONS, DISCRIMINATION COMPLAINTS, AND OTHER PROPOSED DECISIONS SUBMITTED BY ADMINISTRATIVE LAW JUDGES**

Deliberations on matters submitted at prior hearing; on proposed, rejected, remanded, and submitted decisions; petitions for rehearing; and other matters related to cases heard by administrative law judges of the State Personnel Board or by the Board itself. [Government Code Sections 11126 (c) (3), and 18653.]

**8. PENDING LITIGATION**

Conference with legal counsel to confer with and receive advice regarding pending litigation when discussion in open session would be prejudicial. [Government Code sections 11126(e)(1) and 18653.]

Patrick McCollum v. State of California

United States District Court, Northern District of California  
Case No. C 04-03339 CRB

Plata, et al. v. Schwarzenegger, et al.

Case No. C01-1351 THE

Colocousis, et al. v. State Personnel Board, et al.

Sacramento Superior Court Case No. 07CS00461

**9. RECOMMENDATIONS TO THE LEGISLATURE**

Deliberations on recommendations to the legislature.  
[Government Code section 18653.]

**10. RECOMMENDATIONS TO THE GOVERNOR**

Deliberations on recommendations to the Governor.  
[Government Code section 18653.]

**PUBLIC SESSION OF THE STATE PERSONNEL BOARD**

**(10:00 a.m. – Onwards)**

**11. DISCUSSION OF UPCOMING BOARD MEETING SCHEDULE OF OCTOBER 9, 2007, IN SACRAMENTO, CALIFORNIA**

**BOARD ACTIONS:**

12. **ADOPTION OF THE STATE PERSONNEL BOARD SUMMARY MINUTES OF AUGUST 7, 2007**
13. **EVIDENTIARY CASES - (See Case Listings on Pages 9 - 15)**
14. **RESOLUTION EXTENDING TIME UNDER GOVERNMENT CODE SECTION 18671.1 EXTENSION - (See Agenda on Pages 23 - 24)**
15. **NON-EVIDENTIARY CASES - (See Case Listings on Pages 15 - 20)**
16. **NON-HEARING CALENDAR**

The following proposals are made to the State Personnel Board by either the Board staff or Department of Personnel Administration staff. It is anticipated that the Board will act on these proposals without a hearing.

Anyone with concerns or opposition to any of these proposals should submit a written notice to the Executive Officer clearly stating the nature of the concern or opposition. Such notice should explain how the issue in dispute is a merit employment matter within the Board's scope of authority as set forth in the State Civil Service Act (Government Code section 18500 et seq.) and Article VII, California Constitution. Matters within the Board's scope of authority include, but are not limited to, personnel selection, employee status, discrimination and affirmative action. Matters outside the Board's scope of authority include, but are not limited to, compensation, employee benefits, position allocation, and organization structure. Such notice must be received not later than close of business on the Wednesday before the Board meeting at which the proposal is scheduled. Such notice from an exclusive bargaining representative will not be entertained after this deadline, provided the representative has received advance notice of the classification proposal pursuant to the applicable memorandum of understanding. In investigating matters outlined above, the Executive Officer shall act as the Board's authorized representative and recommend the Board either act on the proposals as submitted without a hearing or schedule the items for a hearing, including a staff recommendation on resolution of the merit issues in dispute.

- A. **BOARD ITEMS PRESENTED BY STATE PERSONNEL BOARD OR DEPARTMENT OF PERSONNEL ADMINISTRATION TO ESTABLISH, REVISE OR ABOLISH CLASSIFICATIONS, ALTERNATE RANGE CRITERIA, ETC.**

**COASTAL PROJECT DEVELOPMENT SERIES, STATE COASTAL  
CONSERVANCY**

The State Coastal Conservancy proposes establishment of the Conservancy Project Development Specialist classification, with a six month probationary period; title change to the classification of Conservancy Project Development Analyst III to Conservancy Project Development Manager; and specification revision to the Conservancy Project Development Analyst series specification.

- B. ABOLISHMENT OF CLASSES THAT HAVE HAD NO INCUMBENTS FOR MORE THAN TWO YEARS. DEPARTMENTS THAT UTILIZE THE CLASS AS WELL AS THE APPROPRIATE UNION HAVE NO OBJECTION TO THE ABOLISHMENT OF THESE CLASSES.**

**THE DEPARTMENT OF PERSONNEL ADMINISTRATION AND STATE PERSONNEL BOARD** propose to abolish the following unused classifications, which have been vacant for more than twenty-four months. Departments that utilize the class as well as the appropriate union have no objection to the abolishment of these classes. When classes are proposed to be abolished which are part of a class series, and other classes within the series will continue to be used, the class specification is included in the board item.

**NONE**

**17. STAFF CALENDAR ITEMS FOR BOARD INFORMATION**

**NONE**

**18. CAREER EXECUTIVE ASSIGNMENT (CEA) CATEGORY ACTIVITY**

This section of the Agenda serves to inform interested individuals and departments of proposed and approved CEA position actions.

The first section lists position actions that have been proposed and are currently under consideration.

Any parties having concerns with the merits of a proposed CEA position action should submit their concerns in writing to the Classification and Compensation Division of the Department of Personnel Administration, the Merit Employment and Technical Resources Division of the State Personnel Board, and the department proposing the action.

To assure adequate time to consider objections to a CEA position action, issues should be presented immediately upon receipt of the State Personnel Board Agenda in which the proposed position action is noticed as being under consideration, and generally no later than a week to ten days after its publication.

In cases where a merit issue has been raised regarding a proposed CEA position action and the dispute cannot be resolved, a hearing before the five-member Board may be scheduled. If no merit issues are raised regarding a proposed CEA position action, and the State Personnel Board approves it, the action becomes effective without further action by the Board.

The second section of this portion of the Agenda reports those position actions that have been approved. They are effective as of the date they were approved by the Executive Officer of the State Personnel Board.

**A. REQUESTS TO ESTABLISH NEW OR REVISE EXISTING CEA POSITIONS CURRENTLY UNDER CONSIDERATION**

**DEPUTY DIRECTOR**

The Colorado River Board of California proposes to allocate the above position to the CEA category. The Deputy Director is responsible for policy development and formulation pertaining to water supply, water use, and environmental issues affecting the water, power, and natural resources of the Colorado River and California's long-term rights and interests.

**B. EXECUTIVE OFFICER DECISIONS REGARDING REQUESTS TO ESTABLISH NEW OR REVISE EXISTING CEA POSITIONS**

**CHIEF OF SUPPORT OPERATIONS, CA STATE PRISON, SAN QUENTIN, DEPARTMENT OF CORRECTIONS & REHABILITATION**

The Department of Correction and Rehabilitation's request to allocate the above position has been approved effective July 30, 2007.

**CHIEF, ENTERPRISE RISK MANAGEMENT, DEPARTMENT OF CORRECTIONS & REHABILITATION**

The Department of Correction and Rehabilitation's request to allocate the above position has been approved effective July 30, 2007.

**CHIEF, FISCAL MANAGEMENT SECTION, DEPARTMENT OF CORRECTIONS & REHABILITATION**

The Department of Correction and Rehabilitation's request to allocate the above position has been approved effective July 30, 2007.



**DEPUTY DIRECTOR, HEALTH CARE CONTRACTS OPERATIONS  
BRANCH, DEPARTMENT OF CORRECTIONS & REHABILITATION**

The Department of Correction and Rehabilitation's request to allocate the above position has been approved effective July 31, 2007.

**CHIEF OF HUMAN RESOURCES PLANNING AND INNOVATION,  
DEPARTMENT OF CORRECTIONS & REHABILITATION**

The Department of Correction and Rehabilitation's request to allocate the above position has been approved effective July 31, 2007.

**DEPUTY DIRECTOR, PLAN AND PROVIDER RELATIONS,  
DEPARTMENT OF MANAGED HEALTH CARE**

The Department of Managed Health Care's request to allocate the above position has been approved effective August 22, 2007.

**DISTRICT 11, DEPUTY DISTRICT DIRECTOR, CAPITAL DELIVERY,  
DEPARTMENT OF TRANSPORTATION**

The Department of Transportation's request to allocate the above position has been approved effective August 27, 2007.

**DEPUTY DISTRICT DIRECTOR, CENTRAL REGION RIGHT OF WAY,  
DEPARTMENT OF TRANSPORTATION**

The Department of Transportation's request to allocate the above position has been approved effective August 27, 2007.

**DEPUTY DISTRICT DIRECTOR, NORTH REGION RIGHT OF WAY,  
DEPARTMENT OF TRANSPORTATION**

The Department of Transportation's request to allocate the above position has been approved effective August 27, 2007.

**CHIEF, OFFICE OF PUBLIC AFFAIRS, DEPARTMENT OF CONSUMER  
AFFAIRS**

The Department of Consumer Affairs' request to allocate the above position has been approved effective August 29, 2007.

**19. EMPLOYEE APPOINTMENTS, DISCIPLINARY MATTERS, & OTHER APPEALS**

Deliberations to consider matter submitted at prior hearing. [Government Code sections 11126(d), 18653.]

**20. WRITTEN STAFF REPORT FOR BOARD INFORMATION**

**21. PRESENTATION OF EMERGENCY ITEMS AS NECESSARY**

**22. BOARD ACTIONS ON SUBMITTED ITEMS – (See Agenda on Pages 21 - 22)**

These items have been taken under submission by the State Personnel Board at a prior meeting and may be before the Board for a vote at this meeting. This list does not include evidentiary cases, as those are listed separately by category on this agenda under Evidentiary Cases.

**A D J O U R N M E N T**

### 13. EVIDENTIARY CASES

The Board Administrative Law Judges conduct evidentiary hearings in appeals that include, but are not limited to, adverse actions, medical terminations, demotions, discrimination, reasonable accommodations, and whistleblower complaints.

#### A. BOARD CASES SUBMITTED

These items have been taken under submission by the State Personnel Board at a prior meeting. Cases that are before the Board for vote will be provided under separate cover.

(1) **CASE NO. 05-1007EA**

Appeal from denial of discrimination complaint

**Classification:** Outside contractor

**Department:** Department of Transportation

Proposed decision rejected December 19, 2006.

Pending oral argument April 3, 2007, Sacramento.

Oral argument continued.

Oral argument heard July 10, 2007, Sacramento.

Case ready for decision by FULL Board.

(2) **CASE NO. 03-3412PA**

Appeal from rejection during probation

**Classification:** Correctional Counselor II (Supervisor)

**Department:** Department of Corrections and Rehabilitation

Petition for rehearing granted April 3, 2007.

Transcript prepared.

Pending oral argument July 10-11, 2007, Sacramento.

Oral argument continued.

Oral argument heard September 4, 2007, Sacramento.

Case ready for decision by FULL Board.

(3) **CASE NO. 06-3023A**

Appeal from ten percent reduction in salary for three months

**Classification:** Psychiatric Technician

**Department:** Department of Corrections and Rehabilitation

Proposed decision rejected March 2, 2007.

Transcript prepared.

Oral argument heard August 7, 2007, Pasadena.

Case ready for decision by FULL Board.

**(4) CASE NO. 05-1285A**

Appeal from dismissal

**Classification:** Public Safety Dispatcher II

**Department:** Department of California Highway Patrol

Proposed decision rejected January 9, 2007.

Transcript prepared.

Pending oral argument June 5, 2007, Sacramento.

Oral argument continued.

Oral argument heard September 4, 2007, Sacramento.

Case ready for decision by FULL Board.

**(5) CASE NO. 06-2010A**

Appeal from medical termination

**Classification:** Administrative Support Coordinator II

**Department:** California State University, Los Angeles

Proposed decision rejected May 8, 2007.

Transcript prepared.

Oral argument heard August 7, 2007, Pasadena.

Case ready for decision by FULL Board.

**(6) CASE NO. 07-0806PA**

Appeal from Executive Officer's disapproval of Unarmed Security Guard Services

**Department:** California Highway Patrol

Petition for rehearing granted May 8, 2007.

Oral argument heard September 4, 2007, Sacramento.

Case ready for decision by FULL Board.

**(7) CASE NO. 07-003 (b)**

Appeal from Executive Officer's disapproval of contract

**Classification:** Janitorial Services

**Department:** Department of Health Services

Petition for rehearing granted May 8, 2007.

Oral argument heard September 4, 2007, Sacramento.

Case ready for decision by FULL Board.

**B. CASES PENDING**

**ORAL ARGUMENTS**

These cases are on calendar to be argued at this meeting or to be considered by the Board in closed session based on written arguments submitted by the parties.

**NONE**

**C. CHIEF COUNSEL RESOLUTIONS**

**NONE**

**COURT REMANDS**

This case has been remanded to the Board by the court for further Board action.

**NONE**

**STIPULATIONS**

These stipulations have been submitted to the Board for Board approval, pursuant to Government Code, section 18681.

**NONE**

**D. ADMINISTRATIVE LAW JUDGE'S (ALJ) PROPOSED DECISIONS**

**PROPOSED DECISIONS**

These are ALJ proposed decisions submitted to the Board for the first time.

**(1) CASE NO. 06-0643E**

Appeal from denial of sexual harassment complaint

**Classification:** Senior Right of Way Agent

**Department:** Department of Transportation

- (2) **CASE NO. 03-3412**  
Appeal from rejection during probationary period  
**Classification:** Deputy Attorney, Caltrans  
**Department:** Department of Transportation
- (3) **CASE NO. 06-1101**  
Appeal from medical transfer and constructive medical termination  
**Classification:** Fraud Investigator  
**Department:** Department of Health Services
- (4) **CASE NO. 07-0850**  
Appeal from non-punitive termination  
**Classification:** Clinical Social Worker  
**Department:** Department of Corrections and Rehabilitation
- (5) **CASE NO. 06-3016**  
Appeal from dismissal  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation

**PROPOSED DECISIONS TAKEN UNDER SUBMISSION AT PRIOR MEETING**

These are ALJ proposed decisions taken under submission at a prior Board meeting, for lack of majority vote or other reason.

**NONE**

**PROPOSED DECISIONS AFTER BOARD REMAND**

**NONE**

**PROPOSED DECISIONS AFTER SPB ARBITRATION**

**NONE**

**E. PETITIONS FOR REHEARING**

**ALJ PROPOSED DECISIONS ADOPTED BY THE BOARD**

The Board will vote to grant or deny a petition for rehearing filed by one or both parties, regarding a case already decided by the Board.

- (1) CASE NO. 07-0085P**  
Appeal from 60 workday suspension  
**Classification:** Senior Radiological Technician  
**Department:** Department of Corrections and Rehabilitation
- (2) CASE NO. 04-0172P, 03-3385EP & 04-0019EP**  
Appeal from whistleblower retaliation complaints & dismissal  
**Classification:** Associate Tax Auditor  
**Department:** Franchise Tax Board
- (3) CASE NO. 06-1601P**  
Appeal from dismissal  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation
- (4) CASE NO. 06-0233RP**  
Appeal from ten percent reduction in salary for six months  
**Classification:** Fire Captain  
**Department:** Department of Forestry and Fire Protection
- (5) CASE NO. 06-0015EP**  
Appeal from discrimination  
**Classification:** Correctional Lieutenant  
**Department:** Department of Corrections and Rehabilitation

**WHISTLEBLOWER NOTICE OF FINDINGS**

The Board will vote to grant or deny a petition for rehearing filed by one or both parties, regarding a Notice of Findings issued by the Executive Officer under Government Code, section 19682 et seq. and Title 2, California Code of Regulations, section 56 et seq.

**NONE**

**F. PENDING BOARD REVIEW**

These cases are pending preparation of transcripts, briefs, or the setting of oral argument before the Board.

- (1) CASE NO. 06-3534A**  
Appeal from constructive medical termination  
**Classification:** Psychiatric Technician Assistant  
**Department:** Department of Developmental Services  
  
Proposed decision rejected June 19, 2007.  
Pending transcript.
- (2) CASE NO. 06-3014PA**  
Appeal from punitive transfer  
**Classification:** Correctional Sergeant  
**Department:** Department of Corrections and Rehabilitation  
  
Petition for rehearing granted July 10, 2007.  
Transcript prepared.  
Pending oral argument October 9, 2007, Sacramento.
- (3) CASE NO. 05-1432E**  
Appeal from denial of sexual harassment complaint  
**Classification:** Health Facilities Evaluator Nurse  
**Department:** Department of Health Services  
  
Proposed decision rejected June 5, 2007.  
Transcript prepared.  
Pending oral argument November 5, 2007, San Diego.
- (4) CASE NO. 05-3327A**  
Appeal from dismissal  
**Classification:** Medical Technical Assistant  
**Department:** Department of Corrections and Rehabilitation  
  
Proposed decision rejected July 10, 2007.  
Pending transcript.



- (5) **CASE NO. 06-1413PA**  
Appeal from five percent reduction in salary for six months  
**Classification:** Registered Nurse  
**Department:** Department of Corrections and Rehabilitation

Petition for rehearing granted August 7, 2007.  
Pending transcript

- (6) **CASE NO. 07-1381A**  
Appeal from dismissal  
**Classification:** Correctional Sergeant  
**Department:** Department of Corrections and Rehabilitation

Proposed decision rejected June 5, 2007.  
Transcript prepared.  
Pending oral argument October 9, 2007, Sacramento.

- (7) **CASE NO. 05-1043P**  
Appeal from dismissal  
**Classification:** Tax Counsel, Range D  
**Department:** Board of Equalization

Petition for rehearing granted June 5, 2007.  
Transcript prepared.  
Pending oral argument October 9, 2007, Sacramento.

## 15. NON-EVIDENTIARY CASES

### A. WITHHOLD APPEALS

Cases heard by a Staff Hearing Officer, a managerial staff member of the State Personnel Board or investigated by Appeals Division staff. The Board will be presented recommendations by a Staff Hearing Officer or Appeals Division staff for final decision on each appeal.

### WITHHOLD FROM CERTIFICATION CASES HEARD BY A STAFF HEARING OFFICER

NONE

**WITHHOLD FROM CERTIFICATION**  
**CASES NOT HEARD BY A STAFF HEARING OFFICER**

- (1) **CASE NO. 06-0351N**  
**Classification:** Youth Correctional Counselor  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; a negative employment record and omitted pertinent information.
- (2) **CASE NO. 06-1113N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; inaccurate information and negative law enforcement contacts.
- (3) **CASE NO. 06-1322N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; misdemeanor conviction for DUI.
- (4) **CASE NO. 06-1720N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability, job termination.
- (5) **CASE NO. 06-1850N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; omitted pertinent information.
- (6) **CASE NO. 06-2550N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; illegal drug activity.
- (7) **CASE NO. 06-2415N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; omitted information and failure to meet legal obligations.

- (8) **CASE NO. 06-2480N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; six DUI convictions.
- (9) **CASE NO. 06-2360N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; negative employment record.
- (10) **CASE NO. 06-1633N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; one DUI conviction.
- (11) **CASE NO. 06-2404N**  
**Classification:** Youth Correctional Counselor  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; a negative driving and employment record.
- (12) **CASE NO. 06-2712N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; an active arrest warrant.
- (13) **CASE NO. 06-2414N**  
**Classification:** Medical Technical Assistant  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; omitted pertinent information and negative law enforcement contacts.
- (14) **CASE NO. 06-1821N**  
**Department:** Department of Corrections and Rehabilitation  
**Classification:** Correctional Officer  
**Issue:** Suitability; arrest/conviction record, provided inaccurate information and omitted pertinent information during the selection process.

- (15) **CASE NO. 06-2418N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; firearms prohibition.
  
- (16) **CASE NO. 06-2689N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; omitted pertinent information during the selection process.
  
- (17) **CASE NO. 06-1917N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; firearms prohibition.
  
- (18) **CASE NO. 06-2439N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** Suitability; negative employment record.

**B. MEDICAL AND PSYCHOLOGICAL SCREENING APPEALS**

Cases heard by a Staff Hearing Panel comprised of a managerial staff member of the State Personnel Board and a medical professional. The Board will be presented recommendations by a Hearing Panel on each appeal.

- (1) **CASE NO. 06-0808N**  
**Classification:** Correctional Officer  
**Department:** Department of Corrections and Rehabilitation  
**Issue:** The appellant shows signs of poor judgment and a lack of integrity; personality traits that would significantly interfere with the performance standards for state peace officer employment under Government Code § 1031.

**(2) CASE NO.05-3289N**

**Classification:** Correctional Officer

**Department:** Department of Corrections and Rehabilitation

**Issue:** The appellant's excessive use of alcohol, in addition to his history and behavior demonstrates insufficient integrity. This would significantly interfere with the performance of a CO.

• **CASE NO. 06-3979N**

**Classification:** State Park Ranger Cadet

**Department:** Parks and Recreation

**C. EXAMINATION APPEALS  
MINIMUM QUALIFICATIONS  
MERIT ISSUE COMPLAINTS**

Cases heard by a Staff Hearing Officer, a managerial staff member of the State Personnel Board or investigated by Appeals Division staff. The Board will be presented recommendations by a Staff Hearing Officer or Appeals Division staff for final decision on each appeal.

**(1) CASE NO. 06-0664N**

**Classification:** Driver Safety Officer

**Department:** California Department of Motor Vehicles

**Issue:** Whether the appellant met the minimum qualifications as required to take the DSO examination.

**D. RULE 211 APPEALS  
RULE 212 OUT OF CLASS APPEALS  
VOIDED APPOINTMENT APPEALS**

Cases heard by a Staff Hearing Officer, or a managerial staff member of the State Personnel Board. The Board will be presented recommendations by a Staff Hearing Officer for final decision on each appeal.

**NONE**

**E. REQUEST TO FILE CHARGES CASES**

Investigated by Appeals Division staff. The Board will be presented recommendations by Appeals Division staff for final decision on each request.

**NONE**

**PETITIONS FOR REHEARING CASES**

**NONE**

**SUBMITTED**

**1. TEACHER STATE HOSPITAL (SEVERELY), ETC.**

Departments of Mental Health and Developmental Services. (Hearing held December 3, 2002.)

**2. VOCATIONAL INSTRUCTOR (SAFETY) (VARIOUS SPECIALTIES)**

Departments of Mental Health and Developmental Services. (Hearing held December 3, 2002.)

**3. TELEVISION SPECIALIST (SAFETY)**

The Department of Corrections proposes to establish the new classification Television Specialist (Safety) by using the existing Television Specialist class specification and adding "Safety" as a parenthetical to recognize the public aspect of their job, additional language will be added to the Typical Tasks section of the class specification and a Special Physical Characteristics section will be added. (Presented to Board March 4, 2003.)

**4. HEARING – Personal Services Contract #04-03**

Appeal of the California State Employees Association from the Executive Officer's April 15, 2004, Approval of Master Contracts between the California Department of Corrections and Staffing Solutions, CliniStaff, Inc., Staff USA, Inc., CareerStaff Unlimited, MSI International, Inc., Access Medical Staffing & Service, Drug Consultants, Infinity Quality Services Corporation, Licensed Medical Staffing, Inc., Morgan Management Services, Inc., Asereth Medical Services, and PrideStaff dba Rx Relief. (Hearing held August 12, 2004.)

**5. HEARING**

Proposed new and revised State Personnel Board Regulations effecting equal opportunity, discrimination complaints and reasonable accommodation policies and procedures. (Hearing held July 7, 2004.)

**6. HEARING – PROPOSED AMENDMENTS TO REGULATIONS CONCERNING PROCEDURES THAT APPLY TO COST SAVINGS PERSONAL SERVICES CONTRACTS UNDER GOVERNMENT CODE SECTION 19130(a)** (Hearing held July 10, 2007.)

**7. CASE NO. 05-4007EA**

Appeal from denial of discrimination complaint. Outside contractor. Department of Transportation. (Oral argument held July 10, 2007.)

- 8. PERSONAL SERVICES CONTRACT NO. 07-01.** Appeal of the Department of the California Highway Patrol (CHP) from the Executive Officer's February 21, 2007, Disapproval of CHP's Personal Services Contracts for Custodial Services at the following offices: Torrance Area Office (RFP 078CP62001); Yolo Area Office (RFP 078CP6159); Burney Area Office (RFP 078CP5634R); Anaheim Area Office (RFP 078CP6171); Los Angeles Area Office (RFP 078CP6167); Monterey Park Area Office (RFP 078CP6170); Oceanside Area Office (RFP 078CP6141); Blythe Area Office (RFP 078CP6139); Santa Ana Area Office (RFP 078CP5905R); and Redwood City Area Office (RFP 078CP6143I). (Oral argument held July 10, 2007.)
- 9. CASE NO. 06-3023A.** Appeal from ten percent reduction in salary for three months. Psychiatric Technician. Department of Corrections and Rehabilitation. (Oral argument held on August 7, 2007.)
- 10. CASE NO. 06-2010A.** Appeal from medical termination. Administrative Support Coordinator II. California State University, Los Angeles. (Oral argument held on August 7, 2007.)
- 11. CASE NO. 03-3412PA.** Appeal from rejection during probation. Correctional Counselor II (Supervisor). Department of Corrections and Rehabilitation.
- 12. CASE NO. 05-1285A.** Appeal from dismissal. Public Safety Dispatcher II. Department of the California Highway Patrol.
- 13. PERSONAL SERVICES CONTRACT NO. 06-03, CASE NO. 07-0806PA.** Appeal in the matter of the Executive Officer's disapproval of Unarmed Security Guard Services contract. Department of the California Highway Patrol.
- 14. PERSONAL SERVICES CONTRACT NO. 07-02, CASE NO. 07-003(b)** Appeal in the matter of the Executive Officer's disapproval of the Janitorial Services contract. Department of Health Services.



**NOTICE OF GOVERNMENT CODE SECTION 18671.1 RESOLUTION**

Since Government Code section 18671.1 requires that cases pending before State Personnel Board Administrative Law Judges (ALJ's) be completed within six months or no later than 90 days after submission of a case, whichever is first, absent the publication of substantial reasons for needing an additional 45 days, the Board hereby publishes its substantial reasons for the need for the 45-day extension for some of the cases now pending before it for decision.

An additional 45 days may be required in cases that require multiple days of hearings, that have been delayed by unusual circumstances, or that involve any delay generated by either party (including, but not limited to, submission of written briefs, requests for settlement conferences, continuances, discovery disputes, pre-hearing motions). In such cases, six months may be inadequate for the ALJ to hear the entire case, prepare a proposed decision containing the detailed factual and legal analysis required by law, and for the State Personnel Board to review the decision and adopt, modify or reject the proposed decision within the time limitations of the statute.

Therefore, at its next meeting, the Board will issue the attached resolution extending the time limitation by 45 days for all cases that meet the above criteria, and that have been before the Board for less than six months as of the date of the Board meeting.

**GOVERNMENT CODE SECTION 18671.1 RESOLUTION**

**WHEREAS**, Section 18671.1 provides that, absent waiver by the appellant, the time period in which the Board must render its decision on a petition pending before it shall not exceed six months from the date the petition was filed or 90 days from the date of submission; and

**WHEREAS**, Section 18671.1 also provides for an extension of the time limitations by 45 additional days if the Board publishes substantial reasons for the need for the extension in its calendar prior to the conclusion of the six-month period; and

**WHEREAS**, the Agenda for the instant Board meeting included an item titled "Notice of Government Code section 18671.1 Resolution" which sets forth substantial reasons for utilizing that 45-day extension to extend the time to decide particular cases pending before the Board;

**WHEREAS**, there are currently pending before the Board cases that have required multiple days of hearing and/or that have been delayed by unusual circumstances or by acts or omissions of the parties themselves;

**NOW, THEREFORE, BE IT RESOLVED AND ORDERED** that the time limitations set forth in Government Code section 18671.1 are hereby extended an additional 45 days for all cases that have required multiple days of hearing or that have been delayed by acts or omissions of the parties or by unusual circumstances and that have been pending before the Board for less than six months as of the date this resolution is adopted.

\* \* \* \* \*



1

(Cal. 09/24/07)

TO: Members  
State Personnel Board

FROM: State Personnel Board - Legislative Office

SUBJECT: LEGISLATION

The status of major legislation being followed for impact on Board programs and the general administration of the State Civil Service Merit System is detailed in the attached report.

Any legislative action that takes place after the printing of this report, which requires discussion with the Board, will be covered during the Board meeting.

Please contact me directly should you have any questions or comments regarding any bills that you may have an interest in. I can be reached at (916) 653-0453.

A handwritten signature in cursive script that reads 'Sherry A. Evans'.

Sherry A. Evans  
Director of Legislation

Attachment

**STATE PERSONNEL BOARD  
LEGISLATIVE TRACKING  
REPORT  
2007-08 SESSION**

**Status as of September 13, 2007**



BILL/ AUTHOR	BOARD POSITION	SUBJECT	STATUS OF BILL
<a href="#">AB 67</a> ( <a href="#">Dymally</a> )	<b>SIGN</b>	AB 67 amends the provisions contained in the Dymally-Alatorre Bilingual Services Act (Act) that require state agencies to conduct a biennial language survey and implementation plan and employ qualified bilingual staff when a significant language need is identified. The amendments proposed by this Bill standardize and define language in the Act, clarify the State Personnel Board's (SPB's) responsibility to establish bilingual fluency standards, and expand the SPB's ability to grant exemptions to the language survey and implementation plan.	09/11/2007-Enrolled and to the Governor at 7:45 p.m. 09/11/2007-A ENROLLED
<a href="#">AB 160</a> ( <a href="#">Lieber</a> )	<b>Watch</b>	Would establish the California Sentencing Commission, with specified membership and terms, to devise sentencing guidelines. The bill would also create a Judicial Advisory Committee composed of judges, as specified, to assist the commission. This bill contains other related provisions.	09/12/2007-Read third time, passage refused. (Ayes 9. Noes 25.) Motion to reconsider made by Senator Cedillo. Reconsideration granted. 09/07/2007-S THIRD READING
<a href="#">AB 174</a> ( <a href="#">Price</a> )	<b>No Position</b>	This bill would expand the remedies available to individuals who file discrimination complaints with the State Personnel Board by authorizing the State Personnel Board to award reasonable attorney's fees and costs.	09/05/2007-In Assembly. To enrollment. 09/05/2007-A ENROLLMENT
<a href="#">AB 220</a> ( <a href="#">Bass</a> )	<b>Watch</b>	Would enact the Firefighters Procedural Bill of Rights Act to prescribe various rights of firefighters, defined as any firefighter employed by a public agency, including a firefighter who is a paramedic or emergency medical technician, with specified exceptions. The bill would prescribe rights related to, among others, political activity, interrogation, punitive action, and administrative appeals , with specified requirements imposed upon the employing agency and the imposition of a civil penalty for a violation thereof. The bill would also specify that reimbursement of funds by the state shall be limited to the actual costs associated with the act, as specified . This bill contains other related provisions and other existing laws.	09/12/2007-Senate amendments concurred in. To enrollment. 09/12/2007-A ENROLLMENT
<a href="#">AB 295</a> ( <a href="#">Lieu</a> )	<b>No Position</b>	Would require specified state agencies to use additional separate collection categories and tabulations for other major Asian groups and Native Hawaiians and other Pacific Islander groups, including Bangladeshi, Fijian, Hmong, Indonesian, Malaysian, Pakistani, Sri Lankan, Taiwanese, Thai, and Tongan. This bill would also require that these specified state agencies update their data collection categories to match those used by the United States Census Bureau. This bill would further require a state agency, board, or commission that directly or by contract collects demographic data, include data on specified collection categories	09/12/2007-Senate amendments concurred in. To enrollment. 09/12/2007-A ENROLLMENT

		and tabulations in any demographic report on ancestry or ethnic origins of Californians that it publishes or releases on or after July 1, 2009. This bill would further require a state agency, board, or commission to make the collected data available to the public, in accordance with state and federal law, except for personal identifying information, which shall be deemed confidential.	
<a href="#"><u>AB 392</u></a> ( <a href="#"><u>Lieu</u></a> )	<b>Watch</b>	Would require a qualified employer to allow a qualified employee who is a spouse of a qualified member of the Armed Forces, National Guard, or Reserves to take up to 10 days of unpaid leave during a qualified leave period, as provided. This bill contains other related provisions.	09/11/2007-Senate amendments concurred in. To enrollment. 09/11/2007-A ENROLLMENT
<a href="#"><u>AB 503</u></a> ( <a href="#"><u>Swanson</u></a> )	<b>Watch</b>	Would require the California Research Bureau to conduct a study, to be submitted to the Legislature by June 30, 2008, on issues related to a requirement that state and local agencies provide eight hours' written notice to employees who are required to work overtime. The bill would require the study to address the impacts of such a requirement on both employers and employees .	06/14/2007-Referred to Com. on RLS. 06/14/2007-S RLS.
<a href="#"><u>AB 671</u></a> ( <a href="#"><u>Beall</u></a> )	<b>No Position</b>	Would make legislative findings and declarations regarding the state's responsibility for the well-being of foster youth and former foster youth. The bill would require the State Personnel Board to establish an Emancipated Foster Youth Examination and Appointment Program to promote the hiring of qualified foster youth in specified entry level positions in any state agency or department as determined by the board. The bill would require the board or its designee to conduct competitive examinations to determine the qualifications and readiness of emancipated foster youths for state employment. It would require that all examination appointments to positions under the program be made on a temporary and provisional basis, and would provide that, with the approval of the board, a candidate who successfully completes this temporary period may be appointed, without further examination, to an appropriate position in which civil service status may accumulate. The bill would allow applicants for and candidates in the program examination process to appeal specified actions . This bill contains other related provisions and other existing laws.	08/30/2007-In committee: Set, first hearing. Held under submission. 08/30/2007-S APPR. SUSPENSE FILE
<a href="#"><u>AB 721</u></a> ( <a href="#"><u>Maze</u></a> )	<b>Watch</b>	Would provide that, notwithstanding any other provision of the act, when a Member of the Legislature requests a public record from a state agency, the state agency shall make the determination and notification required by these provisions immediately and in no event later than 3 business days after receipt of the request.	06/01/2007-Failed Deadline pursuant to Rule 61(a)(5). Last location was APPR. SUSPENSE FILE 06/01/2007-A 2 YEAR
<a href="#"><u>AB 890</u></a>	<b>Watch</b>	Would create the Commission on Peace Officer Standards and Training, which would succeed to those functions.	08/30/2007-In committee: Set, first hearing. Held under

( <a href="#">Aghazarian</a> )			submission. 08/30/2007-S APPR. SUSPENSE FILE
<a href="#">AB 933</a> ( <a href="#">Jeffries</a> )	<b>No Analysis Required</b>	Would revise these provisions. The bill would also delete obsolete statutory provisions relating to the Governor, Members of the Legislature, and other statewide elected officers.	07/27/2007-Chaptered by the Secretary of State, Chapter Number 142, Statutes of 2007 07/27/2007-A CHAPTERED
<a href="#">AB 1393</a> ( <a href="#">Leno</a> )	<b>Watch</b>	Would as of July 1, 2009, require any state agency that publishes an Internet Web site to include on the homepage of that site specified information that is not exempt from disclosure under the act about how to contact the agency, how to request records under the act, and a form for submitting online requests for records. It would authorize any person to bring an action to enforce the duty of a state agency to post this information and would provide for penalties including monetary awards to be paid by the agency, with specified provisions to become operative on January 1, 2009. This bill contains other related provisions.	09/12/2007-Senate amendments concurred in. To enrollment. 09/12/2007-A ENROLLMENT
<a href="#">AB 1496</a> ( <a href="#">Swanson</a> )	<b>No Position</b>	Would require any city or county , except a charter city or county, or a charter city and county that provides a civil service system of employment in its charter , that adopts a civil service system or its equivalent, as specified, to provide for the classification of all employment positions. The bill would allow for the exclusion from that classification requirement, substitute and short-term employees, as defined, and apprentices or professional experts employed on a temporary basis for a specific project. Further, prior to the hiring of any short-term employee, the bill would require the legislative body of a city or county to, at a public meeting, report on the specifics of that hiring and certify the ending date of service. The bill would require any existing system to conform to the above-described requirements by March 1, 2008. The bill would exempt from these provisions the continued employment or classification of a county or city employee who is appointed or deputized as a reserve or auxiliary peace officer, as defined, or who is a volunteer or reserve firefighter in the employ of a regularly organized fire department of a county or city.	07/11/2007-In committee: Set, first hearing. Testimony taken. Further hearing to be set. 07/11/2007-S L. GOV.
<a href="#">AB 1648</a> ( <a href="#">Leno</a> )	<b>Watch</b>	Would provide that the confidentiality of peace officer records, as specified, does not apply to specified government bodies that review the investigations, findings, or employment actions of a department or agency. The bill would make specified information in certain disciplinary records pertaining to peace officers available to the public, as specified. This bill contains other related provisions and other existing laws.	05/02/2007-Failed Deadline pursuant to Rule 61(a)(2). Last location was PUB. S. 05/02/2007-A 2 YEAR

<a href="#"><u>AB 1668</u></a> ( <a href="#"><u>Leno</u></a> )	<b>Watch</b>	Would require the Director of Technology Services, in conjunction with the State Chief Information Officer and other specified state entities, to implement a project examining the use of an open file format with no more than 3 state agencies or departments. This bill would further require the State Chief Information Officer, in conjunction with other specified state entities, to report on the results of the project no later than January 10, 2009. This bill would also require the Department of General Services, in consultation with the State Chief Information Officer, to consider specific modifications to the standards used for the state to acquire information technology and to report its findings to the Legislature no later than October 1, 2008.	06/01/2007-Failed Deadline pursuant to Rule 61(a)(5). Last location was APPR. SUSPENSE 06/01/2007-A 2 YEAR
<a href="#"><u>AB 1702</u></a> ( <a href="#"><u>Blakeslee</u></a> )	<b>SIGN</b>	Would authorize the Department of Transportation to conduct competitive examinations on a position-specific basis for specified managerial classifications as agreed to by the State Personnel Board, as specified. The bill would also make legislative findings and declarations with regard to a related demonstration project. This bill contains other related provisions and other existing laws.	09/11/2007-Enrolled and to the Governor at 7:45 p.m. 09/11/2007-A ENROLLED
<a href="#"><u>ACA 1</u></a> ( <a href="#"><u>Price</u></a> )	<b>Watch</b>	Would assign the responsibility for adjusting boundary lines of Senate, Assembly, congressional, and State Board of Equalization districts to a commission that , subject to specified conditions, consists of 11 members, including the 9 public members of the Milton Marks "Little Hoover" Commission on California State Government Organization and Economy and 2 additional persons appointed by those 9 members . It would require the Legislature to establish, by statute, procedures to ensure compliance with specified requirements for membership on the commission. This bill contains other related provisions.	06/21/2007-Re-referred to Com. on APPR. 06/21/2007-A APPR.
<a href="#"><u>SB 26</u></a> ( <a href="#"><u>Simitian</u></a> )	<b>Neutral</b>	This bill would require that demographic data collection by race be structured in a manner that allows the surveyed individual to select more than one race. A single category labeled "multi-racial" would be prohibited.	08/30/2007-Set, second hearing. Held in committee and under submission. 08/30/2007-A APPR. SUSPENSE FILE
<a href="#"><u>SB 519</u></a> (Committee on Governmental Organization)	<b>SIGN</b>	Would authorize the calling of a special meeting to provide for an interim executive officer of a state body upon the death, incapacity, or vacancy in the office of the executive officer.	07/20/2007-Chaptered by the Secretary of State, Chapter Number 92, Statutes of 2007 07/20/2007-S CHAPTERED
<a href="#"><u>SB 721</u></a>	<b>Watch</b>	By January 1, 2010, this bill would require every state agency to establish and implement a succession plan, as defined. By January 1, 2012, the bill would	08/30/2007-Set, second hearing. Held in committee and



( <a href="#">Ashburn</a> )		require every state agency to report to the Legislature on the success or failure of the implemented succession plan, as specified.	under submission. 08/30/2007-A APPR. SUSPENSE FILE
<a href="#">SB 870</a> ( <a href="#">Ridley-Thomas</a> )	<b>Neutral with Amendments</b>	Would require an adverse action against a managerial, supervisory, or confidential employee, as defined, to commence within one year of the cause for discipline.	09/07/2007-Placed on inactive file on request of Assembly Member De Leon. 09/07/2007-A INACTIVE FILE
<a href="#">SB 1019</a> ( <a href="#">Romero</a> )	<b>Support if amended</b>	Would state the intent of the Legislature to abrogate the California Supreme Court decision in Copley Press, Inc. v. Superior Court and to restore public access to meetings and hearings regarding peace officer discipline that were open prior to the Copley Press decision. This bill contains other related provisions.	06/26/2007-Set, first hearing. Held in committee without recommendation. 06/26/2007-A PUB. S.

**STATE PERSONNEL BOARD**

**NON-HEARING CALENDAR**

**RE: BOARD DATE SEPTEMBER 24, 2007**

(Cal. 09/24/07)

**MEMO TO :** STATE PERSONNEL BOARD  
**FROM :** MIKE STRAZZO, Merit Operations Division  
**SUBJECT :** Non-Hearing Calendar Items for Board Action

**Page****COASTAL PROJECT DEVELOPMENT SERIES, STATE COASTAL  
COSERVANCY**

201

The State Coastal Conservancy proposes establishment of the Conservancy Project Development Specialist classification, with a six month probationary period; title change to the classification of Conservancy Project Development Analyst III to Conservancy Project Development Manager; and specification revision to the Conservancy Project Development Analyst series specification.

TO: STATE PERSONNEL BOARD

FROM: MARGIE IMAI, Personnel Program Manager  
Department of Personnel Administration

REVIEWED BY: JOSIE FERNANDEZ, Program Manager  
Department of Personnel Administration

DARYLL TSUJIHARA, Chief, Classification and Compensation Division  
Department of Personnel Administration

SUBJECT: Proposed establishment of the Conservancy Project Development Specialist classification, with a six month probationary period; title change to the classification of Conservancy Project Development Analyst III to Conservancy Project Development Manager; and specification revision to the Conservancy Project Development Analyst series specification

#### SUMMARY OF ISSUES:

The State Coastal Conservancy (SCC) is proposing to establish a new classification of Conservancy Project Development Specialist to recognize the increased responsibilities and the role in the administration and planning of the Conservancy's projects. Since 1976, the SCC's programs and funding have expanded through legislative actions and initiatives. Program staff and management are now involved in multi-agency regional conservation programs, managing resource enhancement and property acquisition projects involving thousands of acres, and overseeing multi-million dollars budgets. SCC is also proposing to retitle the Coastal Project Development Analyst III class to Coastal Project Development Manager to recognize the supervisory responsibilities of the current class and update the series specification to reflect current programs and recruitment practices.

#### CONSULTED WITH:

Regine Serrano, State Coastal Conservancy  
Cindy Martin, State Coastal Conservancy  
Karen Coffee, State Personnel Board  
Jennifer Roche, State Personnel Board  
Daphne Baldwin, State Personnel Board  
Debbie True, Labor Relations Officer, DPA  
Jeannette Williams Gipson, Labor Relations Officer, DPA  
Frank Marr, Labor Relations Officer, DPA  
Michael Baratz, Service Employees International Union (SEIU)  
Mitch Semer, Association of California State Supervisors

In accordance with the terms of the DPA/SEIU contract, DPA has notified the union in writing of this proposal.

#### CLASSIFICATION CONSIDERATIONS:

See attached proposal.

## RECOMMENDATIONS:

1. That the class of Conservancy Project Development Specialist be established; that the probationary period for the Conservancy Project Development Specialist class be six months; and the proposed revised Conservancy Project Development series specification as shown in this calendar be adopted.
2. That the title of the class Conservancy Project Development Analyst III be changed to Conservancy Project Development Manager; and the proposed revised Conservancy Project Development series specification as shown in this calendar be adopted.
3. That the proposed revised specification for the classes of Conservancy Project Development Analyst I and Conservancy Project Development Analyst II appearing in the Conservancy Project Development series specification as shown in this calendar be adopted.
4. That the following resolution be adopted:

WHEREAS the State Personnel Board on September 24, 2007, retitled the Conservancy Project Development Analyst III class to Conservancy Project Development Manager;  
Therefore be it

RESOLVED, That the new class title of Conservancy Project Development Manager employment and certification list reflect the approved Board Item changes; and be it further

RESOLVED, That any existing employment lists established for the class of Conservancy Project Development Analyst III shall be used to certify for vacancies in the class of Conservancy Project Development Manager until such lists are abolished, exhausted, or superseded by new eligible lists, and any persons on existing reemployment lists for the class of Conservancy Project Development Analyst III shall also be placed on reemployment lists for the class of Conservancy Project Development Manager until the expiration of their eligibility on the reemployment lists for the class of Conservancy Project Development Analyst III expires.

## B. CLASSIFICATION CONSIDERATIONS

### BACKGROUND

1. Provide some historical perspective about the organizational setting of the subject class and the needs that this request addresses.

The State Coastal Conservancy (SCC) was created in 1976, and began full operations in 1978. Its jurisdiction included the narrow strip of the Coastal Zone and some inland areas. Its primary programs included the protection, restoration and enhancement of critical coastal lands and habitat, and provision of trails and other public access ways to and along California's 1,100 mile coast. Since 1976, SCC's programs, jurisdiction, funding sources and budget appropriations have expanded through legislative actions and initiatives. Program staff and management are now involved in multi-agency regional conservation programs; managing resource enhancement and property acquisition projects involving thousands of acres; and administering hundreds of millions of dollars.

The Conservancy Project Development Analyst (CPDA) class series is utilized at SCC in the restoration, protection, resource enhancement, access development and agricultural preservation of California's coastline and the San Francisco Bay area. The CPDA classification series was established in 1978. Since then, the legislature has expanded SCC mandate, and coastal communities have looked to SCC to solve bigger and more difficult coastal resource and land use problems. As a result, the projects have increased in size, complexity, cost, political importance, and resource significance.

The current responsibilities of the CPDA class series include organizing, planning, developing and implementing the restoration, enhancement, agricultural preservation, urban waterfronts, site preservation, open space/buffer zone, and access programs of SCC. Incumbents are responsible for all aspects of project development including the solicitation, evaluation, modification, development, and implementation of project proposals. Incumbents analyze a wide variety of complex and controversial resource management and restoration issues as well as sophisticated land acquisition and management techniques such as equity trading of properties, tax-free exchanges of land, structuring of long term payouts using private non-profit organizations, utilization of State and federal tax laws to increase project feasibility, and the determination of economic feasibility using economic cost benefit analyses. Since the classification series specifications was last revised in 1980, there has been significant increase in the complexity of the projects such as: projects with overlapping boundaries (multiple private owners, Federal, and State); multiple resource issues; complex and innovative funding mechanisms; and multiple funding sources. The projects have also increased in scope and size and have multiple implementation phases extending over several years.

The SCC is proposing a new advanced journey or staff specialist class of Conservancy Project Development Specialist (CPDS) in the CPDA classification series to recognize the increased responsibilities and the role in the administration and planning of the more complex projects that have evolved since 1978 when the series was established. Incumbents in the proposed new classification will be taking the lead role in the largest and most controversial coastal projects and programs. The CPDA series specification is being retitled to Conservancy Project Development (CPD) series and the class of CPDA III is being retitled to Conservancy Project Development Manager (CPDM) to recognize the supervisory responsibilities of the current class and to update the series specification to reflect current programs and recruitment practices.

## CLASSIFICATION CONSIDERATIONS

2. What classification does the subject class report to?

The CPDA I, CPDA II and CPDS report to the retitled CPDM.

3. Will the subject class supervise? If so, what classes?

The new proposed class of CPDS will not supervise. However as a staff specialist it may have lead person or team leader duties and responsibilities.

4. What are the specific duties of the subject class?

The CPDS is the advanced journey or specialist level of the series. Incumbents, under general direction, independently perform the most responsible and complex work in planning, development, and implementation of projects and acquisition of coastal and San Francisco Bay area properties. As a staff specialist, incumbents may serve as lead persons or team leaders, assist with program administration and planning, and prepare budget requests. Duties include: project solicitation, evaluation, project scope determination, project development, contract management, project oversight, negotiations regarding funding, land acquisitions, and public and private meetings with project stakeholders.

Incumbents will analyze and negotiate complex transaction involving large, costly properties with significant public scrutiny, and questions regarding appraisals, public benefits, habitat values, and public health and safety; analyze cost, benefits and risks associated with large development projects; select and lead scientific/engineering teams on large development projects that have a high public profile and degree of risk; lead regional and sub-regional programs involving managers, executives and political leaders from the local, State and federal levels and from non-governmental organizations; recommend department policy on program/project priorities, budgeting, and funding for regions and sub-regions; and lead other staff.

5. What is the decision-making responsibility of the subject class?

The SCC programs and projects have extremely high conservation value and are politically significant, costly and long-term. Many of these efforts pose high-levels of risk associated with toxic substances, flooding, and temporal loss of habitat. Many involve experimental or controversial resource enhancement methodologies that risk a degree of failure. The CPDS will be expected to make decisions and recommendations that will impact the Conservancy's project and programs and the State's coastal land conservation.

6. What would be the consequence of error if incumbents in the subject class did not perform their jobs? (Program problems, lost funding, public safety compromised, etc.)

Because of the complexity of Conservancy projects, there is a corresponding requirement on the part of project managers to exercise great diligence in performing their duties. Projects often involve overseeing multi-million dollar budgets, directing and reviewing the work of technical consultants, and entering into sensitive political negotiations. If the CPDS did not perform their jobs the consequences would include loss of valuable coastline restoration and acquisition, and loss of public access to California's coast and the San Francisco Bay area. Additionally, failure on the part of CPDS in exercising their responsibilities has grave consequences for the State, such as possible technical errors resulting in unproductive projects, ineffective use of State funds, damaged relationships with outside parties, and degradation of the coastal environment.

7. What are the analytical requirements expected of incumbents in the subject class?

Incumbents will analyze a wide variety of complex and controversial resource management and restoration issues as well as sophisticated land acquisition and management techniques such as: equity trading of properties; tax-free exchanges of land; structuring of long term payouts using private non-profit organizations; utilization of State and federal tax laws to increase project feasibility; and the determination of economic feasibility using economic cost benefit analyses.

Funding packages for Conservancy projects involve acquisitions and restoration valued at up to \$100 million and more. It is the project manager's responsibility to apply for state and federal grants and other funding sources to supplement state funding appropriations. Fund sources include state, local, federal and trust funds.

Additionally, the area of land necessary for acquisition to accomplish a project may have multiple property owners. This requires the project manager to get



multiple appraisals and negotiate multiple acquisitions for a single project. Some property owners are not willing to sell at first and sometimes do not become willing. In this case, the scope of the project may need to be revised to accomplish the same value of resource preservation and enhancement. The project manager must be able to provide sufficient information regarding the benefits of selling to the State in order to help the landowner to become a willing seller. The Conservancy does not exercise its right to invoke the power of eminent domain. Therefore, getting a landowner and sometimes multiple landowners to be willing to sell requires significant knowledge of tax benefits and other landowner incentives that would induce a landowner to sell their property to benefit a Conservancy project.

8. What are the purpose, type, and level of contacts incumbents in the subject class make?

The CPDS regularly meets and negotiates with regional administrators of other agencies, boards of supervisors, mayors and city council members, leaders in major environmental organizations, and high level scientists and consultants. They also meet directly with private landowners, corporate landowners, and private non-profit conservancy agencies, on environmental issues, land use zoning, and property acquisition. The levels of these contacts vary from city and county planning staff, planning directors, corporate vice-presidents, County Administrative Officers, staff of non-profit conservancy agencies, CEO's of non-profit conservancy agencies, to the traditional deputy director levels in State and federal service.

#### NEED FOR NEW CLASS (if necessary)

9. For New classes only: what existing classes were considered and why were they not appropriate?

SCC reviewed those classes currently established for use in the California Coastal Commission (CCC) and the State Lands Commission (SLC). SCC contemplated using SLC's Public Land Management Specialist Series during the moratorium on "new class establishment and revisions." This would have been a temporary solution until the moratorium was lifted. The SCC has its own classification series which is unique and different from that of the SLC and establishment of the proposed new class to the existing Conservancy Project Development Series is more appropriate.

The PLMS IV classification is used at the State Lands Commission and is part of an existing class series which primarily manages state lands. The SCC does not typically hold and manage land, but rather, develop projects which do include acquisition, but also resource management and protection, public access, wetland restoration and issues relating to watersheds, as well as urban waterfronts restoration, land use issues and subdivisions of properties as well as

agricultural preservation. The PLMS Series is focused on land management and acquisition activities. PLMS work on a wide variety of resource management issues involving public trust resource laws, sovereign and school land titles and boundaries. The PLMS is the closest classification in terms of level of responsibilities, complexity and consequence of error but the focus of the work is different for the two class series.

## MINIMUM QUALIFICATIONS

10. What are the proposed or current minimum qualifications of the subject classes, and why are they appropriate? (Include inside and outside experience patterns.)

The SCC is proposing the following Minimum Qualifications (MQ) changes:

### CONSERVANCY PROJECT DEVELOPMENT ANALYST I

#### Either I

One year in the California state service in planning, project development, and property acquisition at a level of responsibility equivalent to that obtained in the class of ~~Junior~~ Staff Services Analyst (General) .

#### Or II

Experience: Two years of experience in land use planning, land development, architecture, property acquisition and management, ~~or environmental research, environmental education, natural~~ resource management, resource restoration, or a closely related field. (A master's degree, doctorate degree, or membership in The California State Bar may be substituted for one year of the required ~~general~~ experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

### CONSERVANCY PROJECT DEVELOPMENT ANALYST II

#### Either I

One year of experience in the California state service performing the duties of a Conservancy Project Development Analyst I.

#### Or II

Experience: Three years of experience in land use planning, land development, architecture, property acquisition and management, ~~or environmental research, environmental education, natural~~ resource management, resource restoration or

a closely related field. (A master's degree, doctorate degree, or membership in The California State Bar may be substituted for one year of ~~general~~ the required experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

### CONSERVANCY PROJECT DEVELOPMENT SPECIALIST

#### Either I

One year of experience in the California state service performing the duties of a Conservancy Project Development Analyst II.

#### Or II

Experience: Four years of experience in land use planning, land development, architecture, property acquisition and management, environmental research, environmental education, natural resource management, resource restoration or a closely related field. (A master's degree, doctorate degree, or membership in The California State Bar may be substituted for one year of the required experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

### CONSERVANCY PROJECT DEVELOPMENT ANALYST-III MANAGER

#### Either I

~~One year~~ Two years of experience in the California state service performing the duties of a Conservancy Project Development Analyst II.

#### Or II

One year of experience in the California state service performing the duties of a Conservancy Project Development Specialist.

#### Or III

Experience: Four years of progressively responsible experience, ~~one year of which shall have been in a supervisory capacity~~ in land use planning, land development, architecture, property acquisition and management, environmental research, environmental education, natural resource management, resource

restoration or a closely related field, at least one year of which shall have been in a supervisory capacity. (A master's degree, doctorate degree, or membership in the California State Bar may be substituted for one year of ~~general~~ the required experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

The MQ's for the CPD series specification is being expanded to include relevant experience in environmental research, environmental education, natural resource management, and resource restoration. This will expand their current candidate pool. SCC is also proposing to modify the MQ's for CPDA I classification. The "inside" pattern requirement of 1 year as a Junior Staff Analyst (JSA) is being replaced with the class of Staff Services Analyst (General). Departments are not using the JSA class as it has been replaced by the Staff Services Analyst class. Exam data for the last 15 years, indicate that JSAs have not applied for the CPDA I exam.

MQ's for the new class of CPDS is consistent with the minimum experience required for classes with comparable duties and responsibilities and follows the natural progression in the class series. To follow suite, adjustments were made to the MQ's for CPDM from one year to two years of experience in the class of Conservancy Project Development Analyst II and adding the new promotional pattern of one year of experience in the class of CPDS.

Additionally, revisions to the "Knowledge and Abilities" were made to update the language and address the work currently being performed.

## PROBATIONARY PERIOD

11. If a probationary period other than six months is proposed, what is the rationale?

The proposed probationary period for the CPDS is six months. The six-month probationary period is consistent with the other classes in the series. Incumbents will be exposed to most work assignments during a six-month period, and the supervisor will have sufficient time to effectively evaluate job performance.

There is no change in probationary period for the other classes in this series.

## STATUS CONSIDERATIONS

## 12. What is the impact on current incumbents?

The proposal updates the classification specification for the CPDA I, CPDA II, and CPDA III classes and retitles the CPDA III to CPDM. There is no status impact on the current incumbents as they will remain in their existing class.

## 13. Will current employees move by examination, transfer, reallocation, split-off, etc.? Explain rationale.

SCC proposes that movement into the new class of CPDS will be by examination.

## CONSULTED WITH

## 14. In addition to the departmental contacts listed on the cover sheet, list the names and affiliations of persons who were consulted during the development of this proposal.

Neal Fishman, Deputy Executive Officer  
 Steve Horn, Former Deputy Executive Officer  
 Nadine Hitchcock, CPDA III, SF Bay Program Manager  
 Terri Nevins, CPDA III, Central Coast Program Manager  
 Melanie Denninger, CPDA III  
 Karen Gear, CPDA III, North Coast Program Manager  
 Mary Small, CPDA III, South Coast Program Manager  
 Peter Brand, CPDA II  
 Rorie Skei, Chief Deputy Director, Santa Monica Mountains Conservancy

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**CALIFORNIA STATE PERSONNEL BOARD**  
**SPECIFICATION**

CONSERVANCY PROJECT DEVELOPMENT ~~ANALYST~~  
Series Specification  
(Established October 31, 1978)

SCOPE

This series specification describes ~~three~~ four Conservancy Project Development ~~Analyst~~ classes.

<u>Schem</u> <u>Code</u>	<u>Class</u> <u>Code</u>	<u>Class</u>
JW54	4808	Conservancy Project Development Analyst I
JW52	4809	Conservancy Project Development Analyst II
<u>JW51</u>	<u>4814</u>	<u>Conservancy Project Development Specialist</u>
JW50	4815	Conservancy Project Development <del>Analyst III</del> <u>Manager</u>

DEFINITION OF SERIES

The Conservancy Project Development Analyst series describes professional work concerned with the development and implementation of programs and projects dealing with coastal agricultural land preservation, coastal restoration, and resource protection and enhancement, and coastal access development urban waterfront restoration, and the development of public access ways along California's coast and in the San Francisco Bay Area.

Under general direction, incumbents in these classes will organize, plan, develop, and implement the coastal resource protection, restoration, enhancement, agricultural preservation, urban waterfront restoration, site reservation, buffer zone San Francisco Bay Area Conservancy Program, and access programs of the State Coastal Conservancy. They will be responsible for the solicitation, evaluation, modification, development, and implementation of project proposals and plans submitted by local, and State, agencies Federal, and non-profit organizations or originated by the Conservancy itself. In addition, they will develop standards and guidelines for programs and projects review and development, and do other related work.

ENTRY LEVEL

Entry into this series is typically at the Conservancy Project Development Analyst I level.

FACTORS AFFECTING POSITION ALLOCATION

Differentiating factors between levels include level, variety, and complexity of work, nature and amount of public contact, supervision received and exercised, latitude for independent judgment and action, responsibility for decision; and degree of administrative responsibility, program control, and influence on methods and program direction.

DEFINITION OF LEVELSCONSERVANCY PROJECT DEVELOPMENT ANALYST I

This is the entry and first working level of the series. Incumbents, under general supervision, do less responsible and complex work in project planning, development, and implementation of projects, and acquisition and development of coastal and San Francisco Bay Area properties. ~~Positions in this class are not supervisory.~~

CONSERVANCY PROJECT DEVELOPMENT ANALYST II

This is the full ~~journey~~person journey level of the series. Incumbents, under direction, ~~do the more~~ perform responsible and complex work in project planning, development, and implementation of projects, and acquisition and development of coastal and San Francisco Bay Area properties. ~~Positions in this class are not supervisory.~~

CONSERVANCY PROJECT DEVELOPMENT SPECIALIST

This is the advanced journey or staff specialist level of the series. Incumbents, under general direction, independently perform the most responsible and complex work in planning, development, and implementation of projects and acquisition of coastal and San Francisco Bay Area properties. Projects assigned to this level involve large, multiple-sourced funding packages; multiple property owners; competing land development proposals; and public controversy. Incumbents may serve as a lead person or team leader, assist with program administration and planning, and prepare budget requests.

CONSERVANCY PROJECT DEVELOPMENT ~~ANALYST III~~ MANAGER

This is the first supervisory level of the series. Incumbents, under general direction, plan, organize, and direct the work of ~~lower level~~ staff in preparation of project planning, and acquisition, and development of coastal and San Francisco Bay Area properties. ~~Represent the Conservancy before other governmental agencies.~~ Positions in this class are either: (1) managerial, having have significant responsibility for ~~formulating or~~ administering agency

policies and programs; ~~or (2)~~ and represents the Conservancy before other governmental entities and the public. Incumbents are supervisory, performing duties which are substantially different from those of subordinates, and having authority, in the interest of management, to: hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward, or discipline other employees or responsibility to direct them or adjust their grievances, or effectively to recommend such action. The intent under the supervisory pattern is to exclude leadpersons.

#### MINIMUM QUALIFICATIONS

##### CONSERVANCY PROJECT DEVELOPMENT ANALYST I

###### Either I

One year in the California state service in planning, project development, and property acquisition at a level of responsibility equivalent to that obtained in the class of ~~Junior~~ Staff Services Analyst (General).

###### Or II

Experience: Two years of experience in land use planning, land development, architecture, property acquisition and management, ~~or~~ environmental research, environmental education, natural resource management, resource restoration, or a closely related field. (A master's degree, doctorate degree, or membership in The California State Bar may be substituted for one year of the required ~~general~~ experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

##### CONSERVANCY PROJECT DEVELOPMENT ANALYST II

###### Either I

One year of experience in the California state service performing the duties of a Conservancy Project Development Analyst I.

###### Or II

Experience: Three years of experience in land use planning, land development, architecture, property acquisition and management, ~~or~~ environmental research, environmental education, natural resource management, resource restoration, or a closely related field. (A master's degree, doctorate degree, or membership in The California State Bar may be substituted for one year of ~~general~~ the required



experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

#### CONSERVANCY PROJECT DEVELOPMENT SPECIALIST

##### Either I

One year of experience in the California state service performing the duties of a Conservancy Project Development Analyst II.

##### Or II

Experience: Four years of experience in land use planning, land development, architecture, property acquisition and management, environmental research, environmental education, natural resource management, resource restoration, or a closely related field. (A master's degree, doctorate degree, or membership in The California State Bar may be substituted for one year of the required experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

#### CONSERVANCY PROJECT DEVELOPMENT ~~ANALYST III~~ MANAGER

##### Either I

~~One year~~ Two years of experience in the California state service performing the duties of a Conservancy Project Development Analyst II.

##### Or II

One year of experience in the California state service performing the duties of a Conservancy Project Development Specialist.

##### Or III

Experience: Four years of progressively responsible experience, ~~one year of which shall have been in a supervisory capacity~~ in land use planning, land development, architecture, property acquisition and management, ~~or~~ environmental research, environmental education, natural resource management, resource restoration, or a closely related field, at least one year of which shall have been in a supervisory capacity. (A master's degree, doctorate degree, or membership in The California State Bar may be substituted for one year

of ~~general~~ the required experience. The above-mentioned degrees must be in either Public Administration, Business Administration, Environmental Science, Environmental Planning, City or Regional Planning, Natural Resource Management, Architecture, Economics, Geography, Biology, Earth Science, Civil Engineering, or a closely related field. Only one substitution may be applied.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

### KNOWLEDGE AND ABILITIES

#### CONSERVANCY PROJECT DEVELOPMENT ANALYST I

Knowledge of: The principles and practices of economics; to evaluate the feasibility and economic impact of urban waterfront and other projects affecting coastal resources and waterfront economies; principles and practices of natural resources; and land use planning to evaluate, prioritize, and structure acquisition, restoration, and access projects; the building and construction industry to review bid packages, cost estimates, and construction drawings; architectural design principles to promote excellence of design and projects which exhibit innovation in sensitively integrating human-made features into the natural coastal environment; property management to ensure stewardship of State investments and avoid liability claims; land-acquisition; State real estate transaction procedures to ensure compliance with State law and policies and control agency oversight; environmental assessment to identify contaminant risks and liabilities during due diligence periods to protect State investments; the policies and procedures of the California Coastal Commission, San Francisco Bay Conservation and Development Commission, and other coastal management agencies; and the policies and programs of the State Coastal Conservancy.

Ability to: Collect, ~~technical data~~ analyze, and summarize ~~it for use~~ technical data to be used in evaluating proposals, preparing reports, and structuring land acquisitions; analyze situations and take effective action to ensure the interests of the Conservancy and the State are protected; establish and maintain cooperative and effective relations with those contacted in the course of work; develop, review, and guide plans and projects ~~for good results~~ to completion; communicate ~~well orally and in writing~~ effectively on a one-to-one basis and in group settings as well as in presentations for the purpose of obtaining information or presenting information that is clear and concise; write effectively as in the preparation of letters, reports, staff recommendations, contracts, and grant agreements; organize and utilize time management skills including the ability to balance multiple project priorities, advancing project objectives, and managing workloads effectively; use analytical skills and effective

problem solving techniques in the formulation and development of projects; create solutions to address complex resource issues; effectively present controversial matters to small and large groups for the purpose of providing information or explaining Conservancy procedures and policies; and facility with various computer software programs such as Word, Excel, PowerPoint, and Outlook.

## CONSERVANCY PROJECT DEVELOPMENT ANALYST II

Knowledge of: All of the above, and specific land acquisition ~~and management~~ techniques, ~~such as~~ including: acquisition of land at less-than-fair market value; structuring of long-term payouts for land using private nonprofit organizations; equity trading of properties in order to accomplish specific types of coastal restoration; tax-free exchanges of land for restoration and enhancement of significant coastal areas; tax-free exchanges, option agreements, conservation easements, installment sales, leasebacks, or exchanges to structure and execute the most complex land transactions; utilization of State and Federal tax laws to increase project feasibility; determination of economic feasibility of restoration projects using the formulas and rule of thumb of private developers; methods of contractor selection, ~~and securing of public and private funds~~ to ensure compliance with State law and policies and control agency oversight; local, State, Federal, and private funding sources to leverage State funding for projects; determination of when and in what circumstances to acquire purchase options; computation of economic feasibility of sale and leaseback of agricultural lands; ~~and~~ acquisition of conservation and open space easements or other types of less-than-fee interests in real property; public relations policies and strategies to effectively communicate, respond to, and maintain good relations with the public, stakeholders, media, and others to support Conservancy programs and projects; State and Federal grant programs; and relationships between local, regional, State, Federal, private agencies, and organizations.

Ability to: All of the above, and to work effectively with Federal, State, and local plans and regulations agencies to ensure project compliance with laws, regulations, and plans; balance and resolve conflicting needs for, and conflicts between, urban, rural, various uses of coastal and San Francisco Bay Area resources, including: agricultural, ~~natural, access,~~ habitat, resource extraction, and recreational uses public recreation; implement projects and programs through supervision, assistance, and monitoring; successfully negotiate with government officials, landowners, and developers other stakeholders to develop contracts, permits, and other agreements necessary for projects; and represent Conservancy interests before other governmental entities, elected officials, and private organizations.

CONSERVANCY PROJECT DEVELOPMENT SPECIALIST

Knowledge of: Extensive knowledge of natural resources and land use planning to evaluate, prioritize, and structure acquisition, restoration, and access project; State real estate transaction procedures to ensure compliance with State law and policies and control agency oversight; environmental assessment to identify containment risks and liabilities during due diligence periods to protect State investments; specific land acquisition techniques, including: tax-fee exchange option agreements, conservation easements, installment sales, leasebacks, or exchanges to structure and execute the most complex land transactions; methods of contractor selection to ensure compliance with State laws and policies and control agency oversight; local, State, Federal, and private funding sources to leverage State funding for projects; utilization of State and Federal tax laws to increase project feasibility; determination of economic feasibility of restoration projects using the formulas and rule of thumb of private developers; determination of when and in what circumstances to acquire purchase options; acquisition of conservation and open space easements or other types of less-than-fee interests in real property; policies and procedures of the California Coastal Commission, San Francisco Bay Conservation and Development Commission, and other coastal management agencies; policies and programs of the State Coastal Conservancy; the principles and techniques of team leadership to effectively manage teams of a variety of experts, stakeholders, governmental agencies, and other interested parties to successfully design and complete land acquisitions, habitat restorations, public access projects, or other projects; project management, budgeting, scheduling, and planning to ensure timely and cost-effective completion of projects; strategic planning to develop goals, objectives, and strategies for Conservancy programs and projects; State legislative bill processes to analyze impacts of and provide input on legislation relating to Conservancy programs and projects; State budget processes to provide input to Resources Agency, Department of Finance, and legislative subcommittees; and to prepare budget change proposals relating to Conservancy's programs.

Moderate knowledge of the principles and practices of economics to evaluate the feasibility and economic impact of urban waterfront and other projects affecting coastal resources and waterfront economies; the building and construction industry to review bid packages, cost estimates, and construction drawings; architectural design principles to promote excellence of design and projects which exhibit innovation in sensitively integrating human-made features into the natural coastal environment; property management to ensure stewardship of State investments and avoid liability claims; computation of economic feasibility of sale and leaseback of agricultural lands; public relations policies and strategies to effectively communicate, respond to, and maintain good relations with the public, stakeholders, media, and others to support Conservancy programs and projects; State and Federal grant programs; and relationships between local, regional, State, Federal, private agencies, and organizations.

Skills in: Collecting, analyzing, and summarizing technical data to be used in evaluating proposals, preparing reports, and structuring land acquisitions; analyzing situations and taking effective action to ensure the interests of the Conservancy and the State are protected; developing, reviewing, and guiding plans and projects to completion; negotiating with governmental officials, landowners, and other stakeholders to develop contracts, permits, and other agreements necessary for projects; representing Conservancy interests before other governmental entities, elected officials, and private organizations; providing assistance to managerial and supervisory staff in developing and implementing programs and policies; effectively presenting controversial matters in public forums to inform and influence decisions; developing and maintaining relationships with local, State, Federal agencies, and private organizations to facilitate management of Conservancy projects and ensuring effective communication; making effective and concise verbal presentations to project partners and the Coastal Conservancy Board; organizational time and management skills, including skill in balancing multiple project priorities, advancing project objectives, and managing workloads effectively; analyzing and utilizing effective problem solving techniques in the formulation and development of projects, and creating solutions to address complex resources issues; and facility with various computer software programs such as: Word, Excel, PowerPoint, and Outlook.

Ability to: Establish and maintain cooperative and effective relations with those contacted in the course of work; work effectively with Federal, State, and local agencies to ensure project compliance with laws, regulations, and plans; balance and resolve conflicting needs between various uses of coastal and San Francisco Bay Area resources, including agriculture, habitat, resource extraction, and public recreation; mentor staff and lead teams to implement the programs and projects; develop innovative solutions for difficult and complex projects utilizing a multitude of tools and techniques; provide effective leadership to project team members to ensure timely completion of projects by making effective use of team resources, resolving team conflicts, and maintaining open communications; provide effective interagency policy coordination and technical input for projects that involve multiple agencies and other governmental entities; communicate effectively on a one-to-one basis and in group settings as well as presentations for the purpose of obtaining information or presenting information that is clear and concise; and write effectively as in the preparation of letters, reports, staff recommendations, contracts, and grant agreements.

#### CONSERVANCY PROJECT DEVELOPMENT ANALYST III MANAGER

Knowledge of: All of the above, and the principles and techniques of office administration, and personnel management; supervision of, and program and project development management; the legislative process; and departmental and State of California affirmative action and upward-

~~mobility programs and goals~~ a manager's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment.

Ability to: All of the above, and to plan, organize, supervise direct, and motivate staff; establish criteria, regulations, and guidelines for governmental decision making; design programs; oversee effectively manage the implementation of projects; represent the Conservancy before other governmental agencies; and effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

#### CLASS HISTORY

<u>Class</u>	<u>Date Established</u>	<u>Date Revised</u>	<u>Title Changed</u>
Conservancy Project Development Analyst I	10/31/78	11/20/80	--
Conservancy Project Development Analyst II	10/31/78	11/20/80	--
<u>Conservancy Project Development Specialist</u>		--	--
Conservancy Project Development <del>Analyst III</del> <u>Manager</u>	10/31/78	11/20/80	--

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(Cal. 09/24/07)

**MEMO TO** : STATE PERSONNEL BOARD  
**FROM** : MIKE STRAZZO, Merit Operations Division  
**SUBJECT** : Staff Calendar Items for Board Information

**NONE PRESENTED**